



Planon Service Definition

G-Cloud 15

The Planon Solution

Planon provides software for Property and Real Estate, Space and Workplace, Maintenance, Integrated Services including Help Desk, Sustainability and Room Booking. The general term for this category of software, recognised by Gartner and Verdantix, is Integrated Workplace Management System, or IWMS and developing into Connected Portfolio Intelligence Platform, or CPIP. Other historical terms include CAFM. Planon's software is known as Accelerator.

Key Accelerator functionality includes:

- Space Management
- Maintenance Management
- Help Desk
- Asset Management
- Property and Real Estate Portfolio/Lease Administration
- IFRS 16 for Lease Accounting
- Move Management
- Project Management
- Facilities Management
- Desk and Room Booking
- Catering
- Visitor Management
- Energy and Sustainability
- Agile Workplace Management
- Smart Building Technology including Sensors
- Compliance
- BMS system integration for Condition Based Maintenance

Planon's core business focus is developing software and providing the necessary professional services to implement the software.

Further details can be found here:

<https://planonsoftware.com/uk/software-services/>

Planon's Accelerator software solution consists of 4 domains, with a maturity scale from Core through Advanced to Enterprise which are set out below:

Domain	Core	Advanced	Enterprise	Add-ons
 Planon Real Estate Management	✓ Planon Portfolio Management ✓ Planon Lease Management ✓ Planon Invoice and Cashflow Management ☐ Core Planon Self-Service functionality: ▪ Online Self-Service forms	✓ Core package ✓ Planon Transaction Management ✓ Planon Capital Project Management	✓ Advanced package ✓ Planon Strategic Space Planning	☐ Planon Lease Accounting ☐ Planon Cost Settlement ☐ Planon Turnover Rent Settlement ☐ Planon Connect for Analytics
 Planon Space & Workplace Services Management	✓ Planon Space Management ✓ Planon CAD Integration ✓ Planon Move Management ✓ Planon Room and Amenities booking ✓ Planon Hotelling ✓ Planon Access Management ✓ Planon Facility Service Management ✓ Planon Contract and SLA Management ☐ Core Planon Self-Service functionality: ▪ Planon Workplace App ▪ Planon Booking ▪ Planon Facility Service Request ▪ Online Self-Service forms	✓ Core package ✓ Planon Workplace Insights ✓ Planon Visitor Management ✓ Planon Project Management ☐ Planon Room Booking Panels ☐ Planon Kiosk ☐ Advanced Planon Self-Service functionality: ▪ Core Planon Self-Service functionality ▪ Planon Workplace App ▪ Planon Colleague Finder ▪ Planon Connect for Calendar	✓ Advanced package ✓ Planon Connect for AutoCAD	☐ Planon Field Services functionality ☐ Planon Connect for Sensor Data ☐ Planon Connect for OpenBIM ☐ Planon Connect for Analytics
 Planon Asset & Maintenance Management	✓ Planon Reactive Work Orders ✓ Planon Preventive Maintenance ✓ Planon Asset Lifecycle Management ✓ Planon Vendor and Warranty Management ✓ Planon Budget Management ✓ Planon Health and Safety Management ✓ Planon Project Management ☐ Core Planon Field Service functionality: ▪ Planon Mobile Field Services ▪ Planon Graphical Resource Planner ☐ Core Planon Self-Service functionality: ▪ Planon Workplace App ▪ Planon Facility Service Request ▪ Online Self-Service forms	✓ Core package ✓ Planon Objective Based Maintenance ✓ Planon Assessments ✓ Planon Observations ✓ Planon Mobile Observations ✓ Planon Predictive Maintenance ✓ Planon Inventory Management ✓ Planon Procurement Management ☐ Planon Mobile Assessment Survey ☐ Planon Mobile Observations	✓ Advanced package ✓ Scopes for activities ✓ Snapshots from plans	☐ Planon Fleet Management ☐ Planon Connect for Building Advisor ☐ Planon Connect for OpenBIM ☐ Planon Connect for Analytics ☐ Planon Asset Attribute Management
 Planon Energy & Sustainability Management	✓ Planon Energy Data Capture ✓ Planon Emissions Calculation ✓ Planon Performance Monitoring ✓ Planon Dashboards and Analytics ✓ Planon Reporting ✓ Planon Audit Trail ✓ Online Self-Service forms	✓ Core package ✓ Planon Utility Bill Management ✓ Planon Objectives Management ✓ Planon Improvement Plans ✓ Planon Project Management		☐ Planon Connect for ESM measuring point ☐ Planon Connect for Analytics

Planon Pricing Overview

Professional Services

Planon offers differentiated rates according to the type of professional service required.

ConsultancyType	Day Rate	Notes
Project Manager, Senior Consultant, Senior Application Manager and Solution Architect	£1,295	Working day/week – 09:00 – 17:30 Monday to Friday, excluding public holidays. Travel and subsistence are not included in above day rates. Charged at standard class public transport rate and/or mileage charge at AA published rate.
Implementation Consultant, ICT Consultant, Infrastructure Consultant and Application Manager	£1,240	
Trainer	£1,240	

Cloud Hosting Costs

Hosting Element	Rate	Notes
Planon Cloud	£0 (Included in SaaS software cost)	This is for a single environment (production) for unlimited users
Extra Environment(s)	£228 per additional environment per month	Acceptance, Test, Development. Having 12 additional environments is recommended
Extra Disk Space	100GB = £74 per month 1000GB = £428 per month	

Software Costs – SaaS licence model

The licence model for the software is SaaS, whereby there is an annual subscription, payable in advance, for the required number of named users.

The initial subscription period is up to 36 months, with an option to extend for a further 12 months.

The SaaS annual subscription includes the software licence, software upgrades, maintenance and support and the Cloud Service.

There are three different types of user profiles who use Planon. They are:

1. 'Back Office' Users

These users require the full functionality of the Planon system. Each user can access one or more of Planon's different solutions.

Example users include:

- Helpdesk Operators, Facility Managers, Resource Allocators, Operational Managers

IWMS Domain*	Core	Advanced	Enterprise
Real Estate Management (REM)	£123	£147	£173
Space & Workplace Services Management (SWSM)	£123	£147	£173
Asset & Maintenance Management (AMM)	£87	£109	£144
Energy & Sustainability Management (ESM)	£136	£147	£147

*Costs are per user per month

IWMS Discount Schedule	Tier of Users	Discount Schedule
REM, SWSM, AMM & ESM	01-10	0%
REM, SWSM, AMM & ESM	11-25	15%
REM, SWSM, AMM & ESM	26-50	30%
REM, SWSM, AMM & ESM	51-100+	45%

2. 'Self-Service' Users

These users require a 'light' version of the system via a web interface or dedicated Workplace app.

Example users include:

- Requestors logging faults/booking desks and meeting rooms
- Managers wanting to view graphical dashboards
- Approvers – accepting or rejecting work

IWMS Self-Service Domain**	Number of named users						
	100	500	1,000	2,000	3,500	6,000	10,000+
Real Estate Management (REM)	£323	£906	£1,161	£1,600	£2,206	£2,549	£3,879
Space & Workplace Services Management (SWSM)	£589	£1,653	£2,117	£2,920	£4,026	£4,652	£7,079
Asset & Maintenance Management (AMM)	£391	£1,097	£1,404	£1,937	£2,671	£3,087	£4,699
Energy & Sustainability Management (ESM)	£323	£906	£1,161	£1,600	£2,206	£2,549	£3,879

**These are total costs per month

Planon is also able to offer Perpetual Licensing & Campus Management under Lot 2: Cloud Software (SaaS)

Planon also has further modules, a marketplace and apps available as we develop extensions to solutions, new functionality and mobile apps in our Platform – Planon marketplace can be found here:

<https://planonsoftware.com/uk/marketplace/>

3. Planon Mobile for Field Service (PMFS) users

PMFS - Mobile users can pick up and complete/close off work orders via a dedicated app on their tablet or smartphone.

Example users include:

- Internally employed tradespeople
- Cleaners
- Contractors/Engineers

User Group	No. of named users	No. of named users	No. of named users	No. of named users
PMFS named users	1-50	51-100	101-300	>300
Cost per month	£56	£31	£23	£11

Prices exclude VAT and assume Planon SaaS Agreement terms and conditions.

What isn't included in the price?

The Accelerator SaaS software prices above exclude the Professional Services time to implement the Planon solution. This includes Project Management, system configuration, data migration and training. Each project is unique and our experienced, Planon employed, UK-based Services department will work with you to create an implementation proposal, the costs for which will use the Professional Services day rates listed above.

Data Extraction Costs

£0. All data in Planon Accelerator can be exported in CSV, HTML, PDF and MS Excel formats, by the customer, using simple tools.

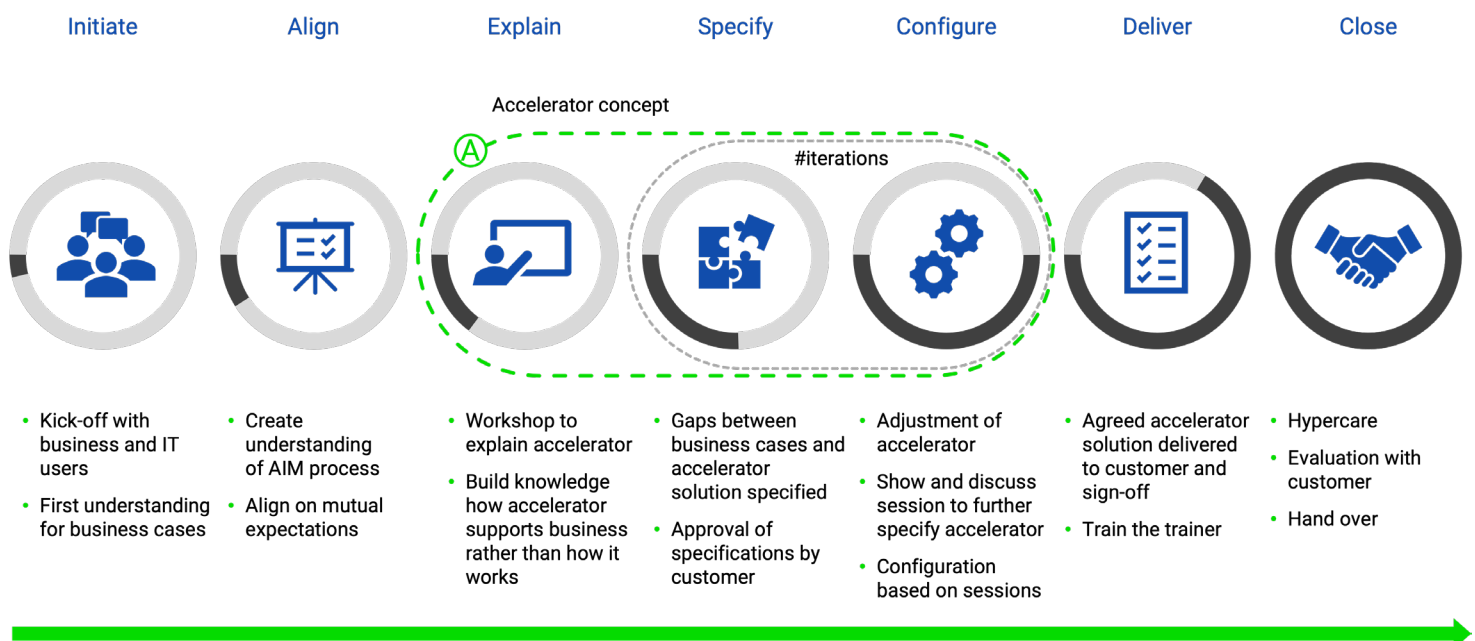
The Planon Accelerator On-boarding Process

Planon's Implementation Process: Accelerator Implementation Method (AIM)

Whilst the chosen software platform is of course critical to the success of any project, arguably more important is the implementation process itself and also the support given after implementation. Planon fully understands this and will work closely with you to deliver a successful system that is flexible enough to be effective now and for the next 10 years.

Once contracts have been agreed between both Planon and the Buyer, the Implementation 'phase' begins. Known as the Accelerator Implementation Method (AIM), Planon follows this phased approach to implementing the software.

The key outcomes of each phase of AIM are as follows:



AIM ensures a structured implementation and this in turn lowers risk. Vital to success is a clear and mutual understanding at the outset of your requirements and objectives, as the purpose of Accelerator is to contribute value to your organisation's performance.

Planon Accelerator is delivered with pre-configured best-practice workflow processes and reports and this reduces greatly the implementation process and offers a fast return on investment. The AIM approach allows you to benefit from the Accelerator pre-configuration, whilst at the same time, it identifies where configuration is needed to meet your precise specific processes.

The AIM process includes specific stages which act as milestones within the delivery process. We provide full implementations, proof of concept projects and blueprint methodologies, where a single site is used as a template for further locations and multi-phased projects. Our professional services team provides a fully controlled and flexible delivery approach to ensure all project aims and objectives are met and aligned with budgets. Our approach to managing the project includes a variety of collaborative documents to identify and manage risks, project plans, project status reports and change control processes.

Planon Project Managers are also fully versed in Agile and Sprint/Waterfall style project delivery if needed.

Data Import Process

Data can be imported in bulk into Planon using Planon's data import templates. These data import template tools are built using MS Excel, and each column within the spreadsheet corresponds to a field within the Planon system. Planon will provide the Buyer with full training on how to load data into the Planon system using this import/export function, including vital steps such as quality check, cleansing and preparation for import. During the import process, a log will be created that details duplicates, incorrect data and so on to manage errors.

Planon Support

Planon offers customers an Annual Maintenance Contract, which is an ongoing support and maintenance service that includes:

- Unlimited access to the Planon Support Desk for reporting software problems and for raising queries and requests
- Regular monthly software updates, enhancements and new functionality via new software releases
- Dedicated Account Manager for service reviews and roadmap discussions
- Access to additional consultancy expertise on how to configure Planon throughout the lifetime of the contract

The Support Desk is available during the hours of 8:30 am to 5pm Monday to Friday (excluding Bank Holidays) with optional 24/7 support also available if required.

Off-boarding process

Contractual

Typically, the Buyer will sign a SaaS contract for an initial period of up to 36 months. After expiry of this initial period, the SaaS period will be renewed automatically for a further period of 12 months, unless terminated in writing by either Party with three months' written notice. The customer is the Data Controller and therefore has complete control over all data held within the instance(s) of Planon.

Data Export

Planon has an integrated Report Writer which supports the ability for our customers to easily extract the Buyer's data from the Planon system.

Data export formats include:

- CSV
- XLS
- PDF

Planon Cloud Service

Planon's SaaS contract includes a Cloud Service that has a 99.5% contracted availability (excluding Planned Maintenance). Planon provides its Cloud Service in conjunction with Amazon Web Services (AWS) or via Microsoft Azure.

- Planon automatically schedules both a daily and a weekly backup with two weeks retention. However, from the home page within Planon's Cloud administration module, there is a gadget which will enable the Buyer to define the retention period
- This level of support, backup and disaster recovery are all included in Planon's standard SaaS contract
- As part of the Cloud Service, Planon will manage all technical requirements for server and storage hardware, network infrastructure, scaling and demand on behalf of the Buyer
- Planon conducts all technical software upgrades on the environments at no additional cost

Process for backing up data:

- Automatic periodic backups stored for two weeks
- By default, the expiry date for backups is set to 3 months, which also is the maximum selectable expiry date. 10 days prior to expiration, a notification will be shown on the Environment Management gadget. The manual backup that is going to expire will be highlighted. When this happens, you can:
 - Do nothing: the manual backup will be deleted after it is expired.
 - Extend the expiry date (up to 3 months).
 - Delete the manual backup (if it is obsolete).
 - Download the backup first to save it locally, then delete it from your environment.

Amazon Web Services has data centres at multiple locations world-wide. These locations are composed of regions and Availability Zones. Each region is a separate geographic area. Each region has multiple, isolated locations known as Availability Zones. An Availability Zone is isolated, but the Availability Zones in a region are connected through low-latency links providing a back-up site that will be made available in the event of outage of the primary site. There is a UK based Availability Zone.

The buyer can geographically limit data to a specific region in order to comply with UK GDPR provisions, and the buyer's own internal security requirements.

Planon can also provide a Premium Cloud and Dedicated Database Server option should the buyer require it.



About Planon

Planon is the leading global provider of Smart Sustainable Building Management software that connects buildings, people and processes. By eliminating data silos and aligning solutions into one shared information platform, Planon provides all building stakeholders with actionable and meaningful insights. Independent market research and consulting firms have consistently rated Planon as a global leader in the market. Planon has implemented its comprehensive solutions for more than 3,250 clients, supported by offices and partners around the world.